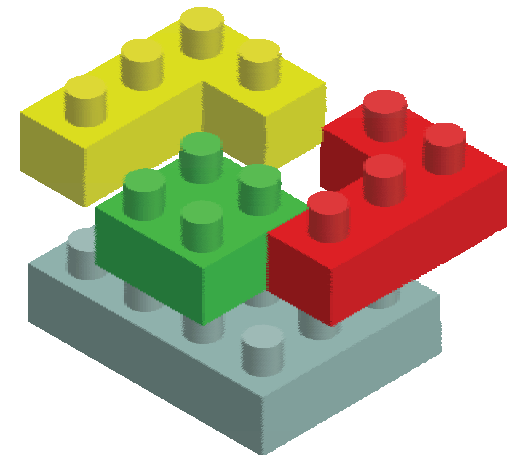# The Sigma-Kuali Student Project Proposals

April 25, 2012 Board Presentation

Kuali Student - Proposals

- **Kuali Student**

  - **Student Financial Aid – Core Federal Compliance**
    - Scholarship Management
    - Student Employment and Work-study
    - Student Early Submission

  - **Kuali Student – Concierge**

April 25, 2012

Kuali Student - Proposals

- **The risks of Financial Aid**
  - Dynamic nature of Federal, State and Institutional policies with complex compliance requirements
  - Critical and very visible financial delivery to the most sensitive of customers
  - Complex system interactions with all core components of Kuali Student, KFS, and external agencies
  - Failures lead to Federal program audits, institutional liabilities and fines, and potential loss of participation in the federal programs.

Kuali Student - Proposals

- **Kuali Risk Mitigation**
  - Functional Domain Experience
  - Kuali Technical Experience
  - Multiple Large and Small Implementation Experience
  - Business Rule Experience
  - Policy Experience
  - Core Team Experience

April 25, 2012

Kuali Student - Proposals

- **Sigma Core Strengths**
  - Student Financial Services Functional Domain Experience
  - Kuali Technical Experience
  - Multiple Large and Small implementation Experience
  - Business Rule Experience
  - Policy Experience
  - Core Team Experience

Student Financial Aid: Core Federal

- Overview of Functional Proposal (1)
  - Federal ISIR Management
  - Federal Verification Management
  - Federal Needs Computation
  - Rule-based automatic Packaging for all Federal and Institutional Funds
  - Funds Management
  - Federal and Institutional Disbursement

April 25, 2012

Student Financial Aid: Core Federal

- Overview of Functional Proposal (2)
  - Federal PLUS Management
  - Federal Reporting and Origination of COD funds
  - Federal Reconciliation of COD funds
  - Federal R2T4 Management
  - Federal Reporting of FISAP section
  - External Agency exchange services for Perkins and Institutional Loan Servicers

April 25, 2012

Student Financial Aid: Core Federal

- Overview of Functional Proposal (3)
  - Key service interactions
    - Student Self Service services
    - Student Mobility services
    - Memoranda and CRM services
    - Core Student services
    - KFS services
    - Document Management services
    - Concierge services
    - Business Rule Framework services

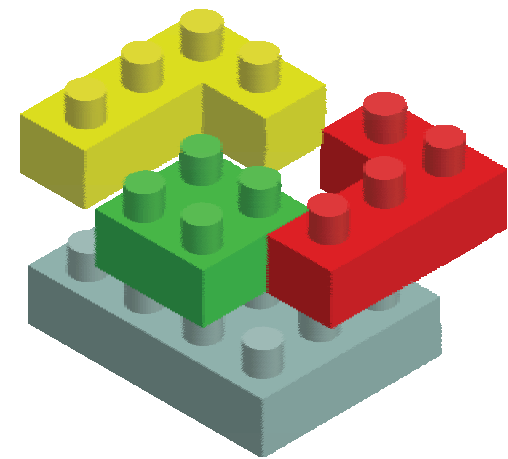April 25, 2012

Student Financial Aid: Core Federal

- **Proposal does not cover**
  - Clock Hour Programs
  - BBAY
  - State Programs

April 25, 2012

Student Financial Aid: Scholarships

- **The Supplemental Component of Student Financial Aid – Scholarship Management**
  - Decentralized administration for departments and scholarship administrators.
  - Large self service requirements for students, donors and administrators.
  - Service integration with student financial aid and all core components of Kuali Student, KFS, external agencies, CRM, concierge management, and prospect management.
  - Business rule architected to support restricted scholarships.

April 25, 2012

Student Financial Aid: Scholarships

- Overview of Functional Proposal (1)
  - Scholarship Catalog
  - Rule Based Customized Eligibility Requirements
  - Management of Current and Historical Scholarships
  - Donor and Scholarship Funds Management
  - Formal Application Management

April 25, 2012

Student Financial Aid: Scholarships

- Overview of Functional Proposal (2)
  - Seamless Integration with Federal, State and Institutional awards
  - Automatic eligibility evaluation and workflow approval processing
  - Decision processing with optional committee or donor approval
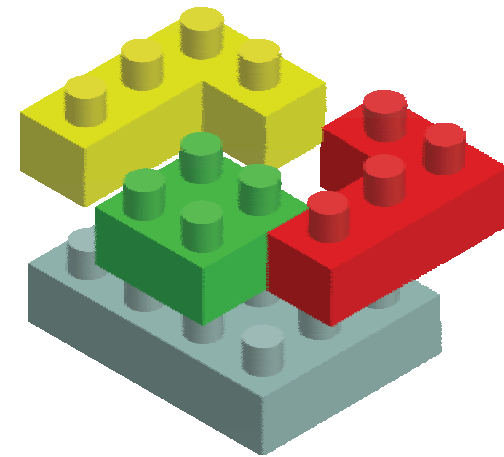 - Thank you letters
  - Management reporting

April 25, 2012

Student Financial Aid: Scholarship

- Overview of Functional Proposal (3)
  - Key service interactions
    - Student Self Service services
    - Student Mobility services
    - Memoranda and CRM services
    - Core Student services
    - Student Financial Aid services
    - KFS services
    - Document Management services
    - Concierge services
    - Business Rule Framework services

- **The Supplemental Component of Student Financial Aid – Early Submission Management**
  - Self service student financial submission.
  - Service integration with student financial aid and all core components of Kuali Student, KFS, external agencies, CRM, concierge management, and prospect management.
  - Business rule architected to support highly complex early submission financial need computation.

April 25, 2012

Student Financial Aid: Early Submission

- Overview of Functional Proposal (1)
  - Student self service to create and maintain an early submission financial account
  - Ability to import/export early financial content from/to external sources
  - Ability to compute a Early Submission Financial Need (ESFN) from submitted early financial content using historical DOE financial need computations
  - Ability to adjust the final ESFN using end user managed business rules

April 25, 2012

Student Financial Aid: Early Submission

- Overview of Functional Proposal (2)
  - Ability to support multiple ESFN algorithms for a single student
  - Seamless integration with submitted Federal content; the use of submitted Federal content is at the discretion of the end user for each financial attribute
  - Ability to freeze an ESFN
  - Ability to create an ESFN financial package using an ESFN and send notifications (note: student financial aid will have the ability to use or package around ESFN awards)
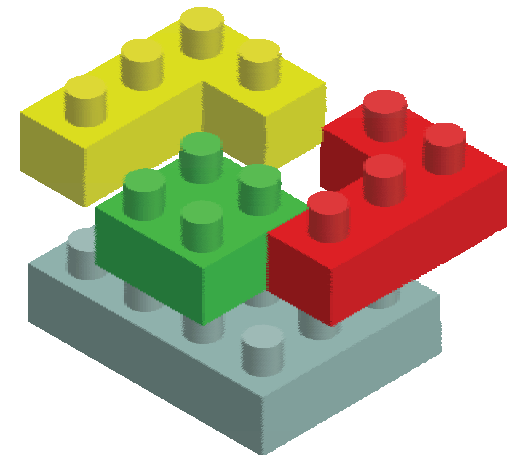
April 25, 2012

![kuali student accounts logo]

Student Financial Aid: Early Submission

- Overview of Functional Proposal (3)
  - Key service interactions
    - Student Self Service services
    - Student Mobility services
    - Memoranda and CRM services
    - Core Student services
    - Student Financial Aid services
    - KFS services
    - Document Management services
    - Concierge services
    - Business Rule Framework services

Student Financial Aid: Student Employment

- The Supplemental Component of Student Financial Aid – Student Employment Management
  - Decentralized position and applicant management
  - Centralized compliance and verification management
  - Complex service interactions with all core components of Kuali Student, KFS, Payroll, Student Financial Aid, CRM, and Concierge management.
  - Business rule architected to automatic assignment of eligible candidates, near eligible candidates, and applicants into restrictive and non-restrictive student work-study and student employment positions.

April 25, 2012

- Compliance of federal policy for federal

Student Financial Aid: Student Employment

- Overview of Functional Proposal (1)
  - Position management (content)
    - Position requirements management
    - Special requirements (e.g. student major, number of hours, schedule availability, pre-employment testing, compliance training etc.)
    - Application and document requirements
    - Position status (available, size of wait list)
    - New position approval using workflow and organizational definition (similar to curriculum management and scholarship architectures)

April 25, 2012

Student Financial Aid: Student Employment

- Overview of Functional Proposal (2)
    - Position management (content)
        - Schedule, description and contact information
        - Position catalog
        - Links to HR for additional content
        - Support position content external to the University
        - Support and verify budget compliance

April 25, 2012

Student Financial Aid: Student Employment

- Overview of Functional Proposal (3)
  - Position management (assignment)
    - Automatic assignment of position from an applicant prospect pool (similar to scholarship management)
    - Determine applicants who are near-eligible for highly restrictive positions
    - Management of application and document requirements
    - Wait listing of eligible, near eligible and prospective candidates and/or formal applicants
    - Notification of employment action of assignment pool including remaining eligible, near eligible, and waitlisted

April 25, 2012

Student Financial Aid: Student Employment

- Overview of Functional Proposal (4)
  - Employee position management (time-slip)
    - Student employee time-slip management with approval from supervisor using workflow

April 25, 2012

Student Financial Aid: Student Employment

- Overview of Functional Proposal (5)
  - Application management
    - Management of applicant's application and document requirements
    - Applicant position request
    - Web search service of all positions
    - Web service to match eligible and near eligible positions for the applicant

April 25, 2012

Student Financial Aid: Student Employment

- Overview of Functional Proposal (6)
  - Employee position management (Compliance)
    - Policy compliance with federal, state and local financial aid regulations
    - Student employee time-slip compliance and remaining eligibility verification with student financial aid
    - Eligibility compliance of terms and conditions of position with student (e.g. student major)
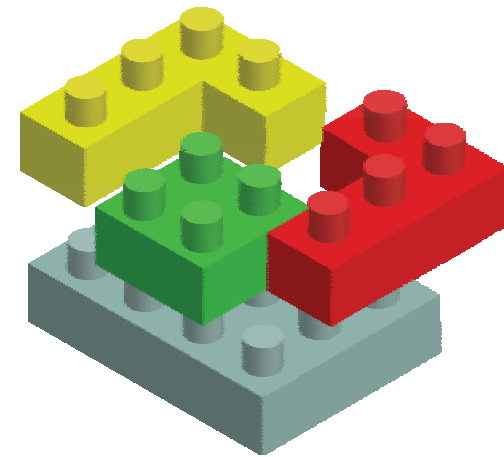
Student Financial Aid: Student Employment

- Overview of Functional Proposal (7)
  - Key service interactions
    - Student Self Service services
    - Student Mobility services
    - Memoranda and CRM services
    - Core Student services
    - Student Financial Aid services
    - KFS services
    - HR and Payroll services
    - Document Management services
    - Concierge services
    - Business Rule Framework services

April 25, 2012

Kuali Student - Core

- Kuali Student: Concierge
  - Designed to answer questions…
    - What if I withdrew?
    - What would happen if I changed my major to mathematics?
    - Can I afford to go to this University?
    - Am I eligible for any scholarships?
    - Why did I not receive my financial aid and how much do I owe?
    - How do I graduate faster?
    - How much debt will I have when I graduate?
    - Can I study abroad and how will that affect me?
  - And to serve….
    - <Concierge> I noticed you are waitlisted for Math 200 this spring. That course is also available during the summer. Did you know that as a full-time summer student, you may be eligible for an additional Pell amount that would cover the cost of your attendance?

Kuali Student - Concierge

- Overview of Functional Proposal (1)
  - Design not less than 10 cross component services using a business rule framework
    - Financial Aid
    - Student Accounts
    - Enrollment
  - Design and develop minimal CRM activity to support follow up by counselors and administrators

April 25, 2012

Kuali Student - Concierge

- For example…
    - What would happen if I changed my major to mathematics?
    - \<Concierge\>
        - I would recommend you take the following courses in the fall period. I noticed you took Math and German in High School.
            - o \<Math 210\> Probability and Statistics
            - o \<German 200\> German Culture
        - You will lose your eligibility for your Political Science Foundation Scholarship however we found a Math Scholarship for $2000 that you are close in eligibility. Here is an example of a potential financial aid package.
        - If you are full-time, the impact on your student fees are small. There are additional program fees that apply to the math program.
        - Congratulations on excelling with a GPA greater than 3.0. You

Student Financial Aid: Scholarship

- Overview of Functional Proposal (2)
  - Key service interactions
    - Student Self Service services
    - Student Mobility services
    - Memoranda and CRM services
    - Core Student services
    - Student Financial Aid services
    - KSA Student Accounting services
    - Business Rule Framework services

Student Financial Aid: Core Federal

Project Comparison with Kuali KSA Project

Description	KSA (Student Accounts)	Student Financial Aid CORE COMPONENT
Projected Billable Hours	7,000	21,000 (FEDERAL) 26,000 (TOTAL)
Projected Contributed Hours	10,000	4,000
Project Length	18 months	22 months (FEDERAL) 28 months (TOTAL)
Phases	2	4 (FEDERAL) 5 (TOTAL)
Milestones	6	10 (FEDERAL) 12 (TOTAL)

Student Financial Aid: Scholarships

Project Comparison with Kuali KSA Project

Description	KSA (Student Accounts)	Student Financial Aid SCHOLARSHIP COMPONENT
Projected Billable Hours	7,000	8,500 (TOTAL)
Projected Contributed Hours	10,000	1,500
Project Length	18 months	12 months
Phases	2	2
Milestones	6	6

April 25, 2012

Student Financial Aid: Early Submission

Project Comparison with Kuali KSA Project

Description	KSA (Student Accounts)	Student Financial Aid Early Submission COMPONENT
Projected Billable Hours	7,000	7,500 (TOTAL)
Projected Contributed Hours	10,000	1,500
Project Length	18 months	12 months
Phases	2	2
Milestones	6	6

April 25, 2012

Student Financial Aid: Student Employment

Project Comparison with Kuali KSA Project

Description	KSA (Student Accounts)	Student Financial Aid Student Employment COMPONENT
Projected Billable Hours	7,000	10,500 (TOTAL)
Projected Contributed Hours	10,000	2,000
Project Length	18 months	14 months
Phases	2	2
Milestones	6	6

April 25, 2012

Kuali Student – Core Concierge

Project Comparison with Kuali KSA Project

Description	KSA (Student Accounts)	Kuali Student Concierge COMPONENT
Projected Billable Hours	7,000	4,500 (TOTAL)
Projected Contributed Hours	10,000	1,000
Project Length	18 months	9 months
Phases	2	2
Milestones	6	4

April 25, 2012

Kuali Student - Proposals

- Next Steps
  - Formal Proposal
  - Questions

April 25, 2012